

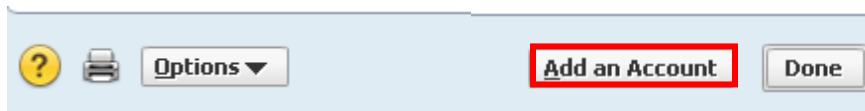
Direct Connect Quicken Guide

Steps to register for Quicken Direct Connect through Online Banking

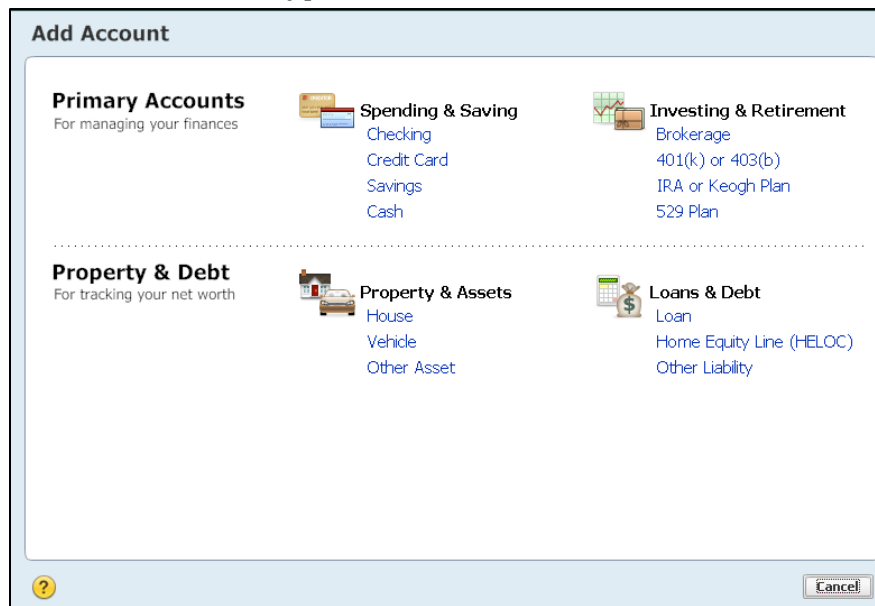
1. Login to Online Banking
2. Navigate to Products and Services
3. Select Connectivity for Quicken and Quickbooks
4. Enter in a password 6-8 characters in length (no special characters)
5. Accept the Terms & Conditions

Steps to add account with Direct Connect to Quicken

1. Log into Quicken
2. Go to Tool
3. Select Account List
4. Click Add an Account



5. Select the Account Type



6. Enter the Name of your Financial Institution (Elevations IB-WC-DC)



7. Click Advance Setup

Add Checking Account

Elevations Credit Union IB WC-DC
WEB: www.elevationscu.com | TEL: 303-443-4672

Elevations Credit Union IB WC-DC User ID / User Name
for your online Elevations Credit Union IB WC-DC account

Elevations Credit Union IB WC-DC password
for your online Elevations Credit Union IB WC-DC account
 Show characters

Save this password

Your credentials are safe with Quicken
We use bank-level encryption to secure your login credentials, they cannot be compromised
We use a read-only connection to your bank. We cannot move or transfer money
[Learn more about our security](#)

? Cancel For more options use **Advanced Setup** Back Connect

8. Make sure that “I want to select the connection method used to download my transactions” is selected

Add Checking Account

I want to select the connection method used to download my transactions
Some banks offer enhanced Online Bill Pay and other services based on the connection method used to download your transactions. Choose this option if you are following specific instructions from your bank, or if you simply want to learn more. Note: Pre-registration for services and fees may be required.

Enter the name of your financial institution

I want to enter my transactions manually
Choose this option if your bank was not found in Simple Setup, or if you prefer to enter transactions into your Quicken registers by hand.

? Back to Simple Setup Next

9. Select Connect Method: Direct Connect

Add Checking Account

Elevations Credit Union IB WC-DC


Select Connection Method

Express Web Connect
- Automatically updates balances and transactions in Quicken by connecting to your bank.

Direct Connect (Fees may apply)
- Automatically updates balances and transactions in Quicken by connecting to your bank.
- Pay your bills and transfer money directly from Quicken (services vary by bank).
- Service may require separate activation. Contact Elevations Credit Union IB WC-DC for more details.

Web Connect
- Manually import balances and transactions into Quicken by downloading a file from your bank website.

[Learn more about how Quicken connects to your bank](#)



10. Enter Quicken Direct Connect Username (Account#) and Password (6-8 characters, set up in Online Banking) and Click Connect


Add Checking Account

Elevations Credit Union IB WC-DC
WEB: www.elevationscu.com | TEL: 303-443-4672

username
for your Elevations Credit Union IB WC-DC account


password
for your Elevations Credit Union IB WC-DC account
 Show characters

Save this password

 **Your credentials are safe with Quicken**

We use bank-level encryption to secure your login credentials, they cannot be compromised

[Learn more about our security](#)

 For more options use [Advanced Setup](#)